TAX AND ACCOUNTING · FREE TEMPLATE

New tax client intake form

Who is on the return, who they support, and the returns filed before yours, collected before you take on a new tax client.

About you

Each person answers this for themselves: the client, and their spouse too when you send it to them.

Full legal name **(required)**

Email address **(required)**

Mobile number

Date of birth

☐ **Photo ID** (required)
A driver’s license or passport is fine.

Your household

Home address

Marital status

☐ Single
☐ Married
☐ Divorced
☐ Widowed

Spouse’s full legal name
Asked only if the answer to “Marital status” is Married.

Dependents

Anyone you support who may be on your return. Add each one.

Add one for each dependent. Copy this section as many times as you need.

Full name

Date of birth

Relationship to you

Past returns

☐ **Your last two years of tax returns**
Federal and state, every page, including the schedules.

☐ **Any letters from the IRS or your state**

Anything we should know before we start